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Women's Dresses

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WOMEN'S, MISSES' & JUNIORS' DRESSES

MARKET TRENDS

After a marked upturn in 1978, dress business appeared to dwindle as 1979 progressed, and the recession deepened. Specialty stores fared somewhat better than department stores and misses' and juniors' dresses performed better than women's dress departments.

In the first eight months of 1980, cuttings appeared to be ahead of the figures for the same period of 1979, based on preliminary data which is, however, subject to revision by the U.S. Census Bureau.

Some basic trends favor the continued strengthening of the dress industry in the coming years. One reason is the reemergence of a more traditional customer in the 1980's reflected in an aging population. The number of career women, who require greater formality and variety in their wardrobes, will continue to grow, and many retailers are catering to their special needs with stepped-up promotions, personalized service, realignment of departments, catalogs and the like.

Stores are also putting more emphasis on plus sizes and on petites, to attract customers who have been generally overlooked in dress merchandising plans. Indeed, retailers have become increasingly aware that the dress market has become very segmented, not only in terms of sizes, but in customers' tastes and lifestyles. The American Dress Council is embarking on a program to enlist greater industry-wide cooperation in sponsoring trunk shows, window promotions and newspaper ads to stimulate dress business, and to try to win the jeans customer over to dress departments.

Sportswear manufacturers have seen an opening for themselves in the dress market, and have been having success with items such as T-shirt dresses and shirtwaists which are sold in dress departments, competing primarily in the $40-to-$60 price points.

In general, in the recessionary period that got underway last year, sales of very high priced apparel have held up well, but business in less expensive lines—proving the influence of the downturn on the majority of customers—has been off. In an effort to hold on to this market, many designers are adding lower price point collections to their offerings. Designers in coming years may increasingly maintain their couture lines for image but use lower price lines to keep themselves in business.

Markdowns came earlier in the season in 1979, and stores have been narrowing resources and watching inventories more stringently in view of interest costs. Despite many positive signs for a resurgence in dress business, it will not be easily attained.

In terms of special dress markets, large and petites are the rapidly growing segments of the industry. There are approximately 30 million adult women in the U.S. that wear large or half-size clothing. Dollar volume in plus sizes has doubled from $2 billion in 1974 to over $4 billion in 1978. Plus-sized women spend about 46% of their apparel dollars on dresses at the present time. This figure is expected to increase in the '80's.

(continued)

MARKET TRENDS

The petite customer estimated at between 50 and 65 million women accounted for approximately 27% of the dress business in 1978. This market increased nearly by half a million between 1978 and 1979. With marketing strategy, this segment of the dress market is expected to show strong gains.

GENERAL STATISTICS ON THE INDUSTRY

Every five years the U.S. Bureau of the Census conducts a complete census of all business activities in the U.S. Results of the most recent census of manufactures, covering operations in the year 1977, are now being released, and the following summarizes key findings compared with 1972 census counts. (In interim years, the Census Bureau conducts annual surveys of manufactures, which result in published estimates based on a representative sample of establishments. These estimates may differ from results of a complete canvass of all establishments and are, therefore, not included in the following industry data.)

In 1977 there were a total of 6,953 plants classified in the Women's and Misses' Dress Industry (i.e., plants where the primary product was dresses or pants dresses). The total value of shipments of primary and secondary products, and miscellaneous receipts of these plants amounted to $4,189 million in 1977, an increase of 17% from 1972. The value of dress shipments, alone, amounted to $4,133 million, also gaining 17% compared with the 1972 total.

The Dress Industry—1972, 1977 (SIC 2335)*

	1977	1972	% Change 1977/1972
Number of companies	6,753	5,295	+27.5%
Number of establishments**	6,953	5,567	+24.9
Employees, total (thous.)	175.3	211.6	-17.2
Production workers (thous.)	153.0	186.5	-18.0
Payroll (mil. $)	$1,197.1	$1,076.9	+11.2
Value added by manufacture (mil. $)***	2,233.7	1,888.7	+18.3
Value of shipments (mil. $)#	4,188.6	3,580.0	+17.0
Capital expenditures, new (mil. $)	45.2	32.6	+38.6

nr = not reported

*SIC (Standard Industrial Classification) 2335 covers establishments primarily engaged in manufacturing women's, misses', and juniors' dresses of all types, including ensemble dresses and pants dresses, whether sold by the unit or by the dozen (daytime house dresses).

**Each business location is counted as a separate establishment. For 1977, the 6,953 establishments in the dress industry included 4,347 manufacturers (regular or inside factory), 462 jobbers (who arrange with contractors to manufacture for them, the jobber supplying the material), 2,144 contractors (outside factories which process materials owned by others, and do not sell the finished garment).

(continued)

***Value added by manufacture is derived by subtracting the cost of products bought for resale without further manufacture, the cost of piece goods and other materials, contract work, etc., from the value of shipments, with adjustments for finished product inventories. It avoids the duplication in value of production which results from the use of products of some manufacturing establishments as materials by others, and is for most purposes the best value measure of individual industries.

#Value of shipments of the dress industry includes, along with receipts for contract work, all items made by or for each establishment from materials owned by it, and also miscellaneous receipts. It includes both primary and secondary products made by manufacturers in this industry. Figures on shipments of dresses, only, by all producers including those classified in other industries are shown on page 11 under SHIPMENTS.

Source: U.S. Bureau of the Census,
1977 Census of Manufactures,
Industry Series MC 77-1-23B.

Employment & Earnings

Due to differences in reporting procedures, employment data reported by the Bureau of Labor Statistics, U.S. Department of Labor, are not in agreement with figures reported by the Census Bureau, Department of Commerce. The trend in production worker employment and earnings as reported by the BLS in the first eight months of 1980 and in recent years is shown below.

In the first eight months of 1980, average production worker employment in the women's dress industry dropped 2.7% below the average in the same 1979 period. Average weekly earnings, however, were up 8.3% despite a slight drop in average weekly hours worked by production workers.

Employment & Earnings in the Dress Industry

	Jan.-Aug. Average			Annual Average		
	1980	1979	% Change 1980/1979	1979	1978	% Change 1979/1978
Women's, misses' & juniors' dresses (SIC 2335)*						
All employees (thous.)	156.1	161.2	- 3.2%	159.3	164.5	- 3.2%
Production workers (thous.)	138.6	142.5	- 2.7	141.1	144.9	- 2.6
Average weekly earnings	$147.1	$135.8	+ 8.3	$137.14	$131.53	+ 4.3
Average weekly hours	31.8	31.7	- 0.3	31.6	32.8	- 3.7
Average overtime hours	0.7	0.8	-12.5	0.8	1.3	-38.5

*For SIC definition, see page 2.

Source: U.S. Bureau of Labor Statistics,
Employment & Earnings.

GENERAL STATISTICS ON THE INDUSTRY

Establishment Size

The dress industry is composed mainly of small plants and a few very large manufacturers. According to the U.S. Bureau of the Census in 1977 there were 6,953 plants (establishments) in the industry, nearly half of which had under 10 employees. Plants with 10 to 49 employees accounted for 38.3% of the total count, while the really large plants, employing 250 or more, held 0.8%.

Of the total 175,300 reported employees, 28.5% were in plants with 20 to 49 employees, and accounted for 28.8% of the total annual payroll of $1.1 billion.

The Women's Dress Industry By Employment Size Class, 1977

	Establishments		Employees		Annual Payroll	
	Number	%	Number	%	Mil. $	%
Total	6,953	100.0%	175,300	100.0%	$1,197.1	100.0%
Employment size class:						
Under 10	3,387	48.7	10,400	5.9	70.8	5.9
10-19	1,093	15.7	15,500	8.8	110.6	9.2
20-49	1,573	22.6	49,900	28.5	344.3	28.8
50-99	586	8.4	39,400	22.5	252.1	21.1
100-249	256	3.7	37,200	21.2	249.1	20.8
250 or more	58	0.8	22,900	13.1	169.3	14.1

Source: U.S. Bureau of the Census,
1977 Census of Manufactures,
Industry Series MC77-1-23B.

Employment & Share of Dress Shipments in Large Plants, 1977 - 1979

	Number of Plants		% of Total Shipments
	With 20+ Employees	With 100+ Employees	Accounted for by Plants With 100+ Employees
Women's, misses' & juniors' dresses (SIC 2335)*			
1979	1,398	394	63%
1978	1,422	404	65
1977	1,314	418	66

*For SIC definition, see page 2.

Source: Sales & Marketing Management,
Survey of Industrial Buying Power,
1978, 1979, 1980 Editions,
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GENERAL STATISTICS ON THE INDUSTRY

Operating Ratios

Key Business Ratios in the Women's & Misses' Dress Industry
(Median Results)

	1979	1978
Number of manufacturing firms reporting	497	427
Current assets to current debt (times)	1.71	1.70
Net profits on net sales (percent)	2.27	2.10
Net profits on net worth (percent)	21.79	21.85
Net sales to net worth (times)	8.34	8.01
Net sales to net working capital (times)	9.67	9.10
Average collection period (days)	41	45
Net sales to inventory (times)	11.5	11.2

Source: Dun & Bradstreet, Inc.
Business Economic Division,
1979 Key Business Ratios,
(All rights reserved).

By Region

The total value of shipments of all producers plus other receipts for plants classified in the Women's, Misses' & Juniors' Dress Industry (SIC 2335) amounted to $4,189 million in 1977, an increase of 17% from 1972. The value of shipments of products classified as primary to the industry (i.e., dresses) was $4,133 million, the balance being made up of secondary products and other receipts.

New York State accounted for the major share of industry shipments and miscellaneous receipts (42.8%) in 1977, followed by California, with 17%. In 1977, as noted in the table on page 2, the industry has 175.3 employees, a decrease of 17% from 1972. The leading states in employment were New York, California, Pennsylvania and Florida, accounting for approximately 65% of the total. This represents a shift from 1972 when New York, Pennsylvania, California and New Jersey accounted for approximately 60% of the industry's employment.

GENERAL STATISTICS ON THE INDUSTRY

By Region

Women's & Misses' Dress Industry
By Geographic Region and Leading States, 1977

Women's & misses' dresses (SIC 2335)*	Number of Establishments		Employees		Value of Shipments**	
	Total	20 or More Employees	Thous.	% of Total	Mil. of $	% of Total
Total U.S.	6,953	2,473	175.3	100.0%	$4,188.6	100.0%
New England						
New Hampshire	7	5	0.2	0.1	2.4	0.1
Massachusetts	141	79	6.8	3.9	144.9	3.5
Rhode Island	15	9	0.5	0.2	9.7	0.2
Connecticut	55	28	1.8	1.0	18.7	0.4
Middle Atlantic						
New York	2,450	957	54.0	30.8	1,792.1	42.8
New Jersey	380	142	8.7	5.0	183.8	4.4
Pennsylvania	535	365	24.8	14.1	337.7	8.1
East North Central						
Ohio	26	9	0.6	0.3	16.6	0.4
Illinois	73	36	4.3	2.4	147.1	3.5
Michigan	18	2	0.3	0.2	5.2	0.1
West North Central						
Iowa	11	2	0.5	0.3	6.0	0.1
Missouri	38	18	1.9	1.1	38.8	0.9
South Atlantic						
Maryland	18	4	0.6	0.3	9.8	0.2
Virginia	38	25	3.4	1.9	40.2	1.0
West Virginia	17	7	1.3	0.7	20.8	0.5
North Carolina	98	46	4.6	2.6	66.7	1.6
South Carolina	41	24	4.9	2.8	50.9	1.2
Georgia	59	26	2.4	1.4	39.5	0.9
Florida	520	129	8.7	5.0	164.6	3.9
East South Central						
Kentucky	12	4	0.4	0.2	5.6	0.1
Tennessee	57	25	3.7	2.1	44.6	1.1
Alabama	33	17	1.9	1.1	22.1	0.5
West South Central						
Arkansas	18	6	1.4	0.8	30.6	0.7
Oklahoma	16	8	0.7	0.4	9.4	0.2
Texas	200	76	6.8	3.9	184.8	4.4
Mountain						
Arizona	24	3	0.3	0.2	6.2	0.1
Pacific						
California	1,831	356	25.0	14.3	710.7	17.0
Hawaii	68	27	2.0	1.1	38.2	0.9

*For SIC definition, see page 2. Includes manufacturers, jobbers and contractors.
**Includes dresses, secondary products and other industry receipts.

Source: U.S. Bureau of the Census,
1977 Census of Manufactures,
Industry Series MC77-1-23B.

PRODUCTION

The long-term trend in U.S. dress production continues downward, with preliminary data for 1979 indicating a decline of more than 10% in cuttings compared with 1978. Based on statistics compiled by the International Ladies' Garment Workers' Union Research Department, which includes adjustment for underreporting in U.S. Bureau of the Census data, the trend in dress output is indicated in the following indexes.

Trend in U.S. Production of Dresses
(Index, 1966 = 100)

Year	Index
1972	90.1
1973	85.7
1974	73.7
1975	69.3
1976	66.4
1977	67.9
1978	65.3

Current information on production (as well as on the value of shipments) of apparel categories are reported by the U.S. Bureau of the Census in the Current Industrial Reports series, which are based on sample surveys. Monthly estimates are issued, as well as an annual report (the latter based on a larger sampling of manufacturers).

The 1979 apparel survey included both manufacturers and jobbers of apparel. Companies engaged in doing contract work on apparel are excluded. Garments manufactured by the contractor are reported by the jobber who owns the material on which the contractor works. Also excluded from the survey are small firms (many of which may be contractors), which were, however, included in the 1977 and 1972 Censuses of Manufactures. In these industry-wide reports, the Census Bureau estimated production and shipments of small firms based on information available through other government agencies and these small firms represented 32% of the total value of shipments reported for 1977.

An extensive reconciliation was conducted between the Current Industrial Report annual apparel survey (MA-23-A) and the 1977 Census of Manufactures which has resulted in numerous revisions to the 1977 data originally published in the CIR report. Information for 1976 and prior years is not directly comparable and should be used with caution. As noted above, coverage in the CIR reports is still not comparable to 1977 and 1972 census of manufactures data since a sizeable segment of the industry may not be included, but it does indicate trends.

Monthly figures in the CIR series for 1979 and 1980 are currently undergoing revision by the Census Bureau. However, total cuttings of dresses in the first seven months of 1980, based on preliminary data, were 7.7% above the total for the same 1979 period.

PRODUCTION

Production of Dresses & Washable Service Apparel in the U.S.
1972, 1977, 1978, 1979
(In Thousands of Units)

	1979*	1978*	1977	1972	% Change 1979/1978	% Change 1977/1972
Women's, misses', juniors' dresses, total	169,697	189,704	183,162	244,748	-10.5%	-25.2%
Unit-priced	nr	nr	129,762	156,044	--	-16.8
Dozen-priced	nr	nr	53,400	88,704	--	-39.8
Women's, misses', juniors' washable service apparel, incl. uniforms, medical & lab jackets, smocks, etc.	36,924**	34,824**	39,552	27,852	+ 6.0	+42.0
Nurses', maids', etc. uniforms	nr	nr	23,688	25,044	--	- 5.4
Medical, lab jackets, smocks	nr	nr	7,008	2,808	--	+149.6
Washable service apparel, type not specified	--	--	8,856	--	--	--

nr = not reported
*Not comparable to 1977 and 1972, as noted above.

Source: U.S. Bureau of the Census, Current Industrial Reports, Apparel Survey, MA-23A 79; Census of Manufactures.

**The National Cotton Council of America has estimated production in this category as follows:

(In Thousands of Units)

	1979	1978	% Change 1979/1978
Women's, misses', juniors' washable service apparel	34,296	32,988	+ 4.0%
Uniforms	26,388	25,392	+ 3.9
Aprons, smocks, etc.	7,908	7,596	+ 4.1

While total production of dresses of all types dropped 10.5% in 1979 compared with 1978, dress production reported in the "Under $6" wholesale price category showed an increase of 4.3%. The biggest share of production, based on reported price lines, however, remained in the $16-and-over bracket.

Dresses made of knit fabrics declined more in 1979 compared with 1978 than noted in figures for woven fabric dresses, registering a decline of 19%.

PRODUCTION

Production of Dresses By Factory (Wholesale) Price Line
1978, 1979

	1979	1978	% Change 1979/1978
Women's, misses', juniors' dresses, total (thous. of units)	169,697	189,704	-10.5%
Percent	100.0%	100.0%	--
Under $6	7.0	6.0	+ 4.3
$6 to $9.99	22.2	24.3	-18.1
$10 to $15.99	26.2	28.8	-18.6
$16 & over	33.6	35.7	-15.7
Price line not specified	10.9	5.2	+88.0

Production of Dresses By Fabric & Construction, 1978, 1979

	1979	1978	% Change 1979/1978
Women's, misses', juniors' dresses, total (thous. of units)	169,697	189,704	-10.5%
Percent	100.0%	100.0%	--
Woven fabric:	56.6	52.1	- 2.8
All cotton & chiefly cotton	7.9	7.3	- 3.4
All man-made & chiefly man-made	43.5	37.7	+ 3.4
All wool & chiefly wool	1.3	1.6	-28.8
All other fabric	3.9	5.5	-36.6
Knit fabric:	33.2	36.4	-19.0
All cotton & chiefly cotton	3.1	3.4	-20.0
All man-made & chiefly man-made	28.5	30.5	-16.5
All wool & chiefly wool	0.7	1.5	-55.5
All other fabric	0.9	1.0	-21.6
Type of fabric not specified	10.2	11.5	-20.4

Source: Based on U.S. Bureau of the Census, Current Industrial Reports, Apparel, MA-23A(79).

PRODUCTION

Materials Consumed

The 1977 census of manufactures reports included information on the delivered cost of fabrics consumed in the production of dresses by plants classified in this industry, as noted below:

Value of Fabrics Used in Dress Production, 1972, 1977
(Delivered Cost in Millions of Dollars)

	1977	1972	% Change 1977/1972
Broad woven fabrics	$331.0	$289.5	+14.3%
Purchased knitted fabrics	222.3	427.1	-47.9%

Source: U.S. Bureau of the Census, 1977 Census of Manufactures, Industry Series MC77-1-23B.

Seasonality in Production

Based on monthly reports on cuttings of women's dresses issued for 1979 and 1978 by the U.S. Bureau of the Census (which are subject to revision), March is the peak month for output, and accounted for 10.5% of the 1979 total.

Percent of Year's Cuttings of Dresses By Months, 1978, 1979

Month	1979	1978
January	8.6%	7.6%
February	9.3	8.3
March	10.5	9.7
April	8.9	9.4
May	8.7	9.1
June	8.7	8.9
July	6.7	7.0
August	7.7	8.9
September	8.0	8.8
October	8.8	8.3
November	7.5	8.4
December	6.6	5.5
Total for year	100.0%	100.0%

Source: Based on U.S. Bureau of the Census, Current Industrial Reports, Apparel (M-23H).

SHIPMENTS

Preliminary data for the year 1979 issued by the Industry & Trade Administration, U.S. Department of Commerce (1980 U.S. Industrial Outlook) placed the total value of shipments of women's, misses' and juniors' dresses in that year at $4.4 billion, up 3.3% compared with 1978 and 6.6% over the value reported for 1977 in the complete census of manufactures.

Value of Shipments of Dresses, 1972, 1977-1979
(Millions of Dollars)

	1979(p)	1978	1977	1972	% Change 1979/1978
Women's, misses', juniors' dresses, total	$4,410	$4,270	$4,133	$3,536	+ 3.3%

(p) = preliminary

Source: U.S. Department of Commerce

The latest industry-wide information on the value of shipments of women's washable service apparel is from the 1977 census of manufacturers. In that year, a total of 39.2 million units were shipped, valued at $193.2 million.

Monthly and annual data on production and shipments of major categories of women's wear are compiled by the Census Bureau and reported in the Current Industrial Reports. However, as previously noted, because of certain limitations in coverage, figures are not comparable to the broader-based data compiled in the complete census of manufacturers.

Value of Shipments of Washable Service Apparel, 1978, 1979
(In Millions of Dollars)

	1979	1978	% Change 1979/1978
Women's, misses', juniors' washable service apparel, including uniforms, medical and lab jackets, smocks, etc.	$224.9	$212.7	+ 5.7%

By Region

Over half (55.1%) of the total value of shipments of unit-priced dresses reported for the year 1977 were shipped by New York State; California followed in importance, accounting for 16.2%.

In dozen-priced dresses (house dresses and the like), New York and Illinois were close in share of shipments, 26.6% and 25.9%, respectively.

Contract work on all types of dresses was separately reported, and New York accounted for the largest share (26.6%) of shipment value in 1977. New York also accounted for the largest share (27.6%) of shipments of washable service apparel for women.

SHIPMENTS

By Region (continued)

Value of Shipments of Dresses & Washable Service Apparel
By All Producers By Geographic Area

	Millions of Dollars		% of Total	
	1977	1972	1977	1972
Women's, misses', juniors' dresses				
Unit-priced				
U.S. total	$1,997.7	$1,827.7	100.0%	100.0%
New England division				
Massachusetts	66.2	111.9	3.3	6.1
Connecticut	4.7	nr	0.2	--
Middle Atlantic division				
New York	1,101.7	910.7	55.1	49.8
New Jersey	71.8	nr	3.6	--
Pennsylvania	134.5	nr	6.7	--
East No. Central division				
Illinois	13.7	16.6	0.7	0.9
West No. Central division				
Missouri	33.2	nr	1.7	--
South Atlantic division				
North Carolina	13.1	10.5	0.7	0.6
Georgia	5.0	14.2	0.2	0.7
Florida	46.7	40.7	2.3	2.2
West So. Central division				
Texas	112.9	72.8	5.6	4.0
Pacific division				
California	323.4	238.1	16.2	13.0
Hawaii	23.7	nr	1.2	--
Dozen-priced				
U.S. total	399.1	378.2	100.0	100.0
New England division				
Massachusetts	19.9	nr	5.0	--
Middle Atlantic division				
New York	106.2	140.0	26.6	37.0
New Jersey	5.5	10.0	1.4	2.6
Pennsylvania	32.6	40.4	8.2	10.7
East No. Central division				
Illinois	103.2	48.6	25.9	12.8
South Atlantic division				
South Carolina	12.9	23.2	3.2	6.1
Florida	4.1	8.0	1.0	2.1
East So. Central division				
Alabama	3.2	nr	0.8	--
Pacific division				
California	43.7	nr	10.9	--

(continued)

SHIPMENTS

By Region (continued)

Value of Shipments of Dresses & Washable Service Apparel
By All Producers By Geographic Area
(continued)

	Millions of Dollars		% of Total	
	1977	1972	1977	1972
Contract work on Women's, misses', juniors' dresses				
U.S. total	$ 694.5	$ 729.7	100.0%	100.0%
New England division				
Massachusetts	33.5	37.9	4.8	5.2
Rhode Island	2.6	2.4	0.4	0.3
Connecticut	9.0	15.0	1.3	2.1
Middle Atlantic division				
New York	184.6	211.3	26.6	29.0
New Jersey	45.8	48.2	6.6	6.6
Pennsylvania	131.2	153.5	18.9	21.0
East No. Central division				
Indiana	5.2	3.1	0.7	0.4
Illinois	13.1	12.7	1.9	1.7
South Atlantic division				
Virginia	19.4	21.5	2.8	2.9
West Virginia	7.5	7.1	1.1	1.0
North Carolina	22.7	14.6	3.3	2.0
South Carolina	22.1	33.4	3.2	4.6
Georgia	11.9	9.8	1.7	1.3
Florida	35.2	26.5	5.1	3.6
East So. Central division				
Tennessee	15.9	nr	2.3	--
Alabama	7.9	11.7	1.1	1.6
West So. Central division				
Arkansas	4.6	3.3	0.7	0.4
Oklahoma	5.5	3.7	0.8	0.5
Texas	26.3	27.3	3.8	3.7
Pacific division				
California	66.0	43.6	9.5	6.0

(continued)

SHIPMENTS

By Region (continued)

Value of Shipments of Dresses & Washable Service Apparel
By All Producers By Geographic Area
(continued)

	Millions of Dollars		% of Total	
	1977	1972	1977	1972
Women's, misses', juniors' washable service apparel				
U.S. total	$ 193.2	$ 105.2	100.0%	100.0%
Middle Atlantic division				
New York	53.3	28.7	27.6	27.3
East No. Central division				
Illinois	2.9	nr	1.5	--
Michigan	2.7	nr	1.4	--
West No. Central division				
Minnesota	3.7	nr	1.9	--
Missouri	20.0	nr	1.0	--
South Atlantic division				
Maryland	7.2	5.4	3.7	5.1
Georgia	22.1	14.1	11.4	13.4
East So. Central division				
Tennessee	12.5	nr	6.5	--
Pacific division				
California	22.8	nr	11.8	--

nr = not reported

Source: U.S. Bureau of the Census,
1977, 1972 Census of Manufactures,
Industry Series MC77-1-23B.

FOREIGN TRADE

The value of imports of women's, misses' and juniors' dresses in 1979 reached close to $103 million, up 9.1% over 1978. According to the Census Bureau, the value of imports has been increasing at a compound annual rate of change of 9.4% in the five year period 1974-1979. Imports of dresses as a percent of total U.S. consumption amounted to 2.3% in 1979, according to the Bureau (1980 U.S. Industrial Outlook).

It was also reported in the 1980 U.S. Industrial Outlook that exports of women's, misses' and juniors' dresses (not including children's) were valued at $37.0 million in 1979, up 0.8% compared with 1978. Exports in current dollars have been increasing at an annual rate of 13.7% in the five year period 1974-1979.

Leading destinations of U.S.-made dresses included Mexico, Canada and Northern Antilles.

Imports by Country of Origin

In 1979, of women's and children's dress imports, the three leading suppliers to the U.S., in rank order, were the Philippines, Hong Kong, and Taiwan with volumes of 6.4, 6.2 and 1.5 million units, respectively.

In dollars, these three countries accounted for 45.6% of the total value of U.S. imports ($109.8 million). Hong Kong exported nearly one-third of this total in 1978 and 1979. All other countries represented less than 10%.

Major changes occurred in silk dress imports from Korea—there was over a 200% increase in both unit and dollar volume for 1979—and in cotton knits from Hong Kong, which reported a 158.1% jump in units and a 150.0% dollar rise.

Silk dress imports led in dollar volume for 1979 with a 25.0% share of total and an 80.1% increase over 1978. In units, although woven man-mades dropped 10.3% in 1979, this dress type led in imports, with 8.2 million units, outpacing the next largest type, wool knits, by 3.4 million units.

FOREIGN TRADE

Imports

Imports of Women's & Children's Dresses
By Leading Country of Origin, 1978, 1979

	Quantity (Thous. of Doz.) 1979	1978	% Change 1979/1978	CIF** Value (Mil. of $) 1979	1978	% Change 1979/1978
Dresses, total	na	na	--	$109.8	$102.2	+ 7.4%
Cotton, not knit, total	363.1	496.4	-26.8%	23.7	30.2	-21.5
India	73.3	128.8	-43.1	5.1	7.5	-32.0
Philippine Rep.	65.4	89.2	-26.7	1.7	2.2	-22.7
Hong Kong	57.7	109.7	-47.4	5.2	8.0	-35.0
Barbados	28.4	20.3	+39.9	1.2	0.7	+71.4
Guyana	22.6	18.2	+24.2	0.9	0.7	+28.6
Wool, not knit, total	4.7	6.7	-29.8	$ 2.3	$ 2.7	-14.8
Hong Kong	1.8	2.7	-33.3	0.6	0.7	-14.3
France	1.0	1.3	-23.1	0.7	0.8	-12.5
Italy	0.6	1.1	-45.4	0.6	0.6	--
Man-made, not knit, total	687.9	766.5	-10.3	$ 27.6	$ 25.4	+ 8.7
Philippine Rep.	363.9	363.8	--	6.2	5.4	+14.8
Haiti	63.5	76.9	-17.4	1.5	1.6	- 6.2
Barbados	50.5	75.6	-33.2	2.1	2.3	- 8.7
Hong Kong	39.2	48.5	-19.2	5.6	3.7	+51.3
Guyana	30.1	33.9	-11.2	1.1	1.1	--
Silk, not knit, total	81.7	38.3	+113.3	$ 28.1	$ 15.6	+80.1
Hong Kong	43.1	23.3	+85.0	12.0	7.0	+71.4
Korean Rep.	30.2	8.2	+268.3	9.3	2.4	+287.5
India	2.7	2.1	+28.6	1.1	0.9	+22.2
Italy	1.8	1.8	--	2.5	2.1	+19.0
Cotton, knit, total	60.6	46.9	+29.2	$ 4.3	$ 3.0	+43.3
Hong Kong	30.2	11.7	+158.1	2.0	0.8	+150.0
Philippine Rep.	4.4	3.7	+18.9	0.1	0.1	--
Colombia	2.6	1.9	+36.8	0.1	0.1	--
Italy	2.5	7.5	-66.6	0.6	0.9	-33.3
France	2.1	2.0	+ 5.0	0.3	0.3	--
Wool, knit, total*	405.3	590.6	-31.4	$ 7.5	$ 9.7	-22.7
Hong Kong	307.2	539.4	-43.0	5.7	7.8	-26.9
Italy	14.3	31.0	-53.9	1.0	1.4	-28.6
France	7.7	3.9	+97.4	0.4	0.2	+100.0
Man-made, knit, total	312.6	302.5	+ 3.3	$ 16.3	$ 15.6	+ 4.5
Taiwan	125.4	115.9	+ 8.2	4.6	4.0	+15.0
Hong Kong	34.0	29.7	+14.5	2.9	2.6	+11.5
Salvador	27.1	11.9	+127.7	1.3	0.7	+85.7
Mexico	25.7	37.7	-31.8	1.7	2.4	-29.2
Philippine Rep.	24.7	28.7	-13.9	0.6	0.7	-14.3

(footnotes continued)

FOREIGN TRADE

Imports

Imports of Women's & Children's Dresses
By Leading Country of Origin, 1978, 1979
(continued)

na - not available
*Quantity reported in thousands of pounds
**CIF (cost, insurance, freight)—refers to value of imports at the first port of entry in the U.S. Based on purchase price and includes all freight, insurance and other charges (excluding U.S. import duties) incurred in bringing the merchandise from country of exportation and generally placing it alongside the carrier at first port of entry in the U.S.

Source: U.S. Bureau of the Census,
U.S. General Imports, Report FT 135,
December, 1978, 1979.

Exports

In 1979 the U.S. exported nearly 10 million dress units worth approximately $46 million. This is a 6.0% increase over the previous year's 9 million, valued at $42.3 million. Nearly three-fourths of the '79 dresses exported were of the woven or not knit classification. Dresses made of synthetics accounted for 77.3% of the wovens, while 51.6% of the knits were cotton.

The breakdown of 1978 unit exports was similar. Slightly less than three-fourths were woven, and of that classification, 65.7% were synthetic. Cotton was the leading fiber in the knit category.

Mexico, Canada and Northern Antilles were the leading U.S. dress importers in 1978 and 1979. Mexico imported approximately one-third or 3.1 million units in 1979, a 171.3% increase over the prior year. Canada and Northern Antilles imported about 1.3 million units in 1979 accounting for 13.5% and 12.8% of total U.S. dress exports.

FOREIGN TRADE

Exports

U.S. Exports of Women's & Children's Dresses, by Type -- 1978, 1979

	Quantity (Thous. of Doz.) 1979	1978	% Change 1979/1978	FAS* Value (Mil. of $) 1979	1978	% Change 1979/1978
Dresses, total	828.7	781.7	+ 6.0%	46.0	42.3	+ 8.7%
Not knit, total	609.6	575.5	+ 5.9	30.3	29.1	+ 4.1
Cotton	103.2	160.4	-35.7	5.7	8.1	-29.6
Wool	15.9	21.3	-25.3	0.8	1.0	-20.0
Man-made	471.1	378.1	+24.6	22.3	18.8	+18.6
Fiber, n.e.c.	19.4	15.7	+23.6	1.5	1.2	+25.0
Knit, total	219.1	206.2	+ 6.3%	15.7	13.2	+18.9%
Cotton	113.1	93.9	+20.4	6.9	5.1	+35.3
Wool	4.0	5.6	-28.6	0.4	0.3	+33.3
Man-made	87.1	87.8	- 0.8	6.7	6.0	+11.7
Fiber, n.e.c.	14.9	18.9	-21.2	1.7	1.8	- 5.6

*FAS = Value at the U.S. port of export, based on the transaction price, including inland freight, insurance, and other charges incurred in placing the merchandise alongside the carrier at the U.S. port of exportation. The value, as defined, excludes the cost of loading the merchandise aboard the exporting carrier and also excludes freight, insurance, and any other charges or transportation costs beyond the port of exportation.

n.e.c. = not elsewhere classified.

Source: U.S. Bureau of the Census, U.S. General Exports, Report FT 410, December, 1978, 1979.

MARKET POTENTIAL

Female Population, 1979 & Projections (Series II)* to 1985, 1990 & 2000

	Female Population (Number in thous.)				% Change	Percent of Total Population			
	1979	1985	1990	2000	2000/1979	1979	1985	1990	2000
Total, all ages	113,128	119,514	125,023	133,790	+18.3%	51.8%	51.3%	51.3%	51.3%
Under 16 years	26,569	26,986	28,493	29,758	+12.0	12.2	11.6	11.7	11.4
16 years & over	86,559	92,528	96,530	104,032	+20.2	39.6	39.7	39.6	39.9
16-19	8,290	7,074	6,652	7,686	- 7.3	3.8	3.0	2.7	2.9
20-34	27,914	30,226	29,583	25,686	- 8.0	12.8	13.0	12.1	9.9
35-54	24,677	27,544	31,638	39,440	+60.0	11.3	11.8	13.0	15.1
55 & over	25,678	27,684	28,656	31,219	+21.6	11.7	11.9	11.8	12.0
Median age (years)	31.5	32.7	33.9	36.8	--	--	--	--	--

*Series II projections assume a fertility rate of 2.1, or at the replacement level.

Source: U.S. Bureau of the Census,
Current Population Reports,
Series P-25, No. 704, July 1977,
Series P-25, No. 870, January 1980.

The "baby boom" began ir 1946 and ended in the early 1960's. Those born in the tail end of that boom are now approaching 20. This group (16-19), representing 3.8% of the female and 7.6% of the total, is the smallest segment of the adult portion of the population.

The 20-34 group, now at an unprecedented peak, has caused some speculation on the possibility of a mini baby boom in the 1980's. This group, which represents about one-fourth of the total and 12.2% of the female population, is expected to decline 8.0% by the year 2000, dropping at an annual rate of approximately 2.6%.

For the next 20 years, the age distribution of our population will favor the steadily rising 35-54 segment. By 2000, the number of females in this age group is expected to increase by 60.0% to 39,440,000 or 2.8% a year, according to the U.S. Bureau of the Census (Series II).

The median age for the female portion of the population in the year 2000 is projected at 36.8, a rise of 5.3 years from the present 31.5.

During the 1970's dramatic changes took place in women's participation in the labor market. At the beginning of the decade, about 31 million women, of 43% of all U.S. women 16 years and over, were in the labor force. By 1979, 43 million, or more than half of all women, were working or looking for work. By the first quarter of 1980, 44 million women were employed, a 2.3% increase over the previous year. According to the Urban Institute, the number of women in the labor force is expected to increase to 52 million by 1990. In 1969, the median weekly earnings of a woman working full-time was $86. By March 1980, that figure increased 115.8% to $220.

MARKET POTENTIAL

Women in the Labor Force for Selected Years, 1950-1980
(In Thousands)

	Labor Force		Women as a %	% Change of Women
	Total	Women	of Total	in Labor Force
1950	62,208	18,389	29.6%	
1955	65,023	20,548	31.6	+11.7%
1960	69,628	23,240	33.4	+13.1
1965	74,455	26,200	35.2	+12.7
1970	82,715	31,520	38.1	+20.3
1975	92,613	36,998	39.9	+17.4
1979	102,908	43,391	42.1	+17.3
1st Qtr. 1980	104,194	44,216	42.4	

Source: U.S. Dept. of Labor,
Bureau of Labor Statistics,
"Perspectives on Working Women,"
June, 1980.

In 1979 working women represented a potential market for apparel in excess of $23 billion per year or $525 per year per working woman. Working women spend more, per capita, on clothing than all other apparel purchases, and will account for $128 billion in earnings in 1981. They will spend close to $12 billion for work apparel by that year, almost half of which will go toward pantsuits, skirtsuits and dresses. The average working woman spends approximately $1,700 a year on this apparel.

Other Specialized Dress Markets:

Bridal Market

The number of marriages in the U.S. are on the increase, and there has also been a greater tendency toward formal ceremonies, requiring special bridal dresses. Bride's magazine says the average bride spends about $310 on her wedding gown, including veil.

In 1979 the marriage rate (number per thousand population) broke the post-World War II record set in 1946, reaching 10.5 per thousand. A total of 2,317,000 marriages were performed. In the first eight months of 1980, the number of marriages totaled 1,623,000—up 2.3% compared with the same 1979 period, and the rate reached 11.0 per thousand. June remains the peak month for marriage ceremonies, followed by the month of August.

MARKET POTENTIAL

Bridal Market (continued)

Monthly Pattern in Marriages, 1977-1979

Month	1979	1978	1977
January	5.5%	5.2%	5.2%
February	5.7	5.4	5.9
March	6.4	7.1	7.2
April	8.0	7.2	7.3
May	9.4	9.4	9.1
June	11.8	12.6	12.8
July	9.7	9.3	9.0
August	10.8	11.2	11.0
September	8.7	8.9	8.7
October	8.4	7.6	7.7
November	8.0	7.9	8.0
December	7.6	8.2	8.1
Total	100.0%	100.0%	100.0%

Source: Based on U.S. Department of Health, Education, and Welfare, Monthly Vital Statistics Report.

Maternity Wear

The market for maternity dresses has been picking up along with the rise in the birthrate and in total births. In the 12 months ending August 1980, the birthrate averaged 16.0 live births per 1,000 population, up from 15.5 in this period of 1979, 15.2 in the 1978 period.

There were 2,357,000 live births during the first 8 months of 1980, a 3% increase over the first 8 months of 1979.

Monthly Pattern in Births, 1977 - 1979

Month	1979	1978	1977
January	8.0	8.1	8.3
February	7.3	7.5	7.7
March	8.1	8.3	8.3
April	7.8	7.6	7.8
May	8.2	8.1	8.3
June	8.1	8.2	8.2
July	8.9	8.8	9.0
August	9.4	9.1	8.9
September	8.6	8.8	8.8
October	8.6	8.7	8.5
November	8.7	8.2	7.9
December	8.3	8.6	8.3
Total	100.0%	100.0%	100.0%

Source: Based on U.S. Department of Health, Education & Welfare, Monthly Vital Statistics Report.

THE POTENTIAL MARKET

Service Apparel

The following information concerning women working in occupations where service apparel is worn, is based on data from the U.S. Department of Labor. In 1979 the total number of women working in selected service occupations amounted to 14.1 million, up by 1.3% from the previous year. Of all the selected service occupations reported, the number of women working as nurses, dietitians or therapists experienced the greatest percentage increase.

Of all the occupations mentioned, "operatives (except transport)" have the largest number of employed females. This would include elevator operators, machinery operators, etc.

Women Working in Occupations Where Service Apparel is Worn, 1978, 1979
(Figures in Thousands)

	1979	1978	% Change 1979/1978
Total women in selected occupations	14,123	13,945	+ 1.3
Nurses, dietitians & therapists	1,387	1,255	+10.5
Health technologists & technicians	371	353	+ 5.1
Operatives, except transport	4,353	4,317	+ 0.8
Private household service workers	1,062	1,135	- 6.
Cleaning workers, except private	872	858	+ 1.6
Food service workers	2,941	2,951	- 0.3
Health service workers	1,643	1,659	- 1.0
Personal service workers	1,370	1,302	+ 5.2
Protective service workers	124	115	+ 7.8

Source: U.S. Department of Labor, Bureau of Labor Statistics, Employment and Earnings, January 1979, 1980.

Women Employees On Payrolls
In Selected Service Industries, 1977 - 1979
(In Thousands)

	Annual Averages		
	1979	1978	1977
Hotels & other lodging places	559.7	520.4	502.1
Hotels, motels & tourist courts	534.9	497.2	479.3
Personal services	607.8	603.0	588.8
Laundry & dry cleanings	221.4	223.0	222.4
Health services	4,101.1	3,903.6	3,716.8
Hospitals	2,135.0	2,054.4	1,978.7
Eating & drinking places	2,564.3	2,380.1	2,203.6
Gasoline service stations	124.7	117.4	109.4
Total women in selected industries	10,848.9	10,299.1	9,801.1

Source: U.S. Department of Labor, Bureau of Labor Statistics, November 1979, March 1980.

PRICE TRENDS

Prices at retail for women's dresses rose 3.5% between 1978 and 1979, but moved up only a half of a percent for the first six months of 1980.

At wholesale, women's and misses' dress prices increased 6.3% between 1978 and 1979. For the first six months of 1980 prices jumped 7.9%. The greater activity at the producer level is attributed to the 1967 base year.

Consumer Price Index for Women's Dresses—1978, 1979 & First Half 1980, 1979
(12/67 = 100)

	Annual Avg.		Jan.-June Avg.		% Change	
	1979	1978	1980	1979	Annual Avg. '79/'78	Jan.-June Avg. '80/'79
Women's dresses	164.1	158.6	164.4	163.6	+ 3.5%	+ 0.5%

Source: U.S. Department of Labor, Bureau of Labor Statistics, Monthly Labor Review.

Wholesale Price Index for Women's & Misses' Dresses—1978, 1979 & First Half 1980, 1979
(12/77 = 100)

	Annual Avg.		Jan.-June Avg.		% Change	
	1979	1978	1980	1979	Annual Avg. '79/'78	Jan.-June Avg. '80/'79
Women's & misses' dresses	107.0	100.7	113.7	105.4	+ 6.3%	+ 7.9%

Source: U.S. Department of Labor Bureau of Labor Statistics, Producer Prices and Price Indexes.

RETAIL SALES

According to a trade source, dress unit sales have dropped from 365 million in 1969 to 211 million units in 1979 (WWD, August 13, 1980).

The retail market for women's dresses is currently valued in excess of $6 billion. In the reports on merchandise line sales by store type, covering outlets with payrolls only, compiled in the 1977 census of retail trade by the U.S. Bureau of the Census, a total of $5.4 billion in retail sales of women's, misses' and juniors' dresses was covered.

Women's ready-to-wear specialty stores accounted for the largest share of this reported total—47.4% in 1977, up from a comparable figure of 45.4% in 1972 census reports. Stores classified as department stores had the second largest share of the market—40.7%, down from 44.2% in the 1972 census.

Reported Sales of Women's Dresses by Store Type, 1977
(Including Stores With Payrolls Only)

	Stores Reporting Dress Sales		Reported Dress Sales	
	Number	Percent	Mil. $	Percent
Total	56,036	100.0%	$5,434.9	100.0%
Women's ready-to-wear stores	32,048	57.2	2,574.4	47.4
Department stores**	8,254	14.7	2,213.7	40.7
Family clothing stores	10,862	19.4	489.2	9.0
Mail order houses	3,650	6.5	122.1	2.3
Other apparel stores***	1,222	2.2	35.5	0.6

*Each business location is reported separately as a store unit, regardless of whether or not the store is part of a multi-unit or chain operation.

**Includes discount department stores as well as traditional department stores. Sales of catalog order desks within the stores are included in the department store data, but not sales of catalog headquarter operations, which are included in mail order houses.

***Includes lingerie shops and other specialized women's apparel outlets, shoe stores, children's wear stores, and stores primarily selling men's wear.

Source: U.S. Bureau of the Census, 1977
Census of Retail Trade, RC77-L.

The 32,048 women's ready-to-wear stores, reporting sales of women's dresses, contributed 23.9% of total store volume in 1977. In the 1972 census of retail trade, 29,170 women's ready-to-wear stores (with payrolls) reported on dress sales and this department represented 29.3% of total volume.

Women's, misses' and juniors' dress departments accounted for 3.1% of the total sales of department stores reporting on dress business in the 1977 census. In 1972, this department representdd 4.3% of total department store sales.

In family clothing stores (which sell both men's and women's wear), dress departments accounted for 7.4% of sales in stores handling this merchandise in 1977. The comparable figure in 1972 was 9.5%.

RETAIL SALES

Seasonal Patterns

Percent of Total Sales By Month
In Dress and Service Apparel Departments

Month	Women's & Misses' Dresses	Better Dresses	Inexpensive Dresses	Aprons, Housedresses & Uniforms
January	5.9%	6.0%	5.7%	6.1%
February	6.0	6.4	5.7	6.2
March	9.0	9.1	8.7	8.1
April	10.0	10.1	10.0	9.8
May	11.1	10.2	11.2	12.3
June	8.4	8.0	8.9	9.9
July	6.6	6.6	6.8	7.8
August	7.4	7.8	7.3	7.1
September	9.2	9.4	9.1	7.7
October	9.0	9.1	8.9	7.3
November	7.8	8.0	7.6	7.4
December	9.6	9.3	10.1	10.3
Total	100.0%	100.0%	100.0%	100.0%

Source: Newspaper Advertising Bureau,
1980 Newspaper Advertising Planbook,
representing a 5-year average (1961-1965).

MERCHANDISING & OPERATING RESULTS

Specialty Stores

The typical specialty store reporting to the National Retail Merchants Association showed a 3.3% increase in the misses' dress business in 1979 compared with 1978 and a 2.8% gain in junior dress department sales. Women's dresses, however, were down 3.6%. This compared with an overall median gain of 6.9% in total adult female apparel for reporting stores.

Markdowns averaged highest in misses' dresses—at 28.4% compared with an overall average of 21.9% of sales of all women's wear.

Specialty Stores (continued)

Dress Department Merchandising & Operating Results in Specialty Stores with Total Annual Sales Over $1 Million, 1979
Typical (Median) Results

	Total Store (52)	All Adult Female Apparel (51)	Women's Dresses (17)	Misses' Dresses (19)	Junior Dresses (26)
Net sales, % change from last year	+ 6.1%	+ 6.9%	- 3.6%	+ 3.3%	+ 2.8%
Sales, % to total store sales	100.0	64.2	0.8	3.6	7.2
Net sales % of adult female apparel	--	100.0	1.5	6.6	10.1
$ sales per sq. ft. of selling space	$140.3	$145.1	$ 95.1	$120.9	$ 90.0
Cumulative mark-on, %	50.5%	50.9%	50.5%	50.2%	50.5%
Gross margin, % of sales incl. cash discounts	42.7	42.2	41.3	37.3	43.0
Markdowns, retail, % of sales	19.4	21.9	24.9	28.4	23.9
Number of stock turns	3.1	3.9	3.7	3.9	4.8

Source: National Retail Merchants Association, "Merchandising & Operating Results," (1980 Edition).

Department Stores

According to the National Retail Merchants Association, the typical department store showed a drop of close to 7% in sales of women's dress departments in 1979 compared with 1978, and junior dress business was down almost 2%. Misses' dress departments managed a slight gain in the typical department store. This compared with an overall gain of 7% in the typical store for all adult female apparel.

Markdowns averaged lower than in specialty store dress departments, but, again, were highest in the misses' dress departments.

MERCHANDISING & OPERATING RESULTS

Department Stores (continued)

Dress & Related Departmental Merchandising & Operating Results
In Department Stores with Total Annual Sales Over $1 Million, 1979
(Typical (Median) Results)

	Total Upstairs Store (143)	All Adult Female Apparel (147)	Bridal/ Formal Dresses (57)	Women's Dresses (96)	Misses' Dresses (96)	Junior Dresses (108)	Utility Dresses, Aprons & Uniforms (37)	Maternity Wear (57)
Net sales, % change from last year	+ 5.5%	+ 7.0%	+ 2.1%	- 6.8%	+ 0.4%	- 1.9%	- 7.4%	+ 2.3%
Sales, % to total store sales	89.2	36.7	0.2	0.4	2.3	0.7	0.6	0.1
Net sales % of adult female apparel	--	100.0	0.4	1.0	6.4	1.9	1.6	0.3
$ sales per sq. ft. of selling space	$ 91.6	$107.4	$ 49.8	$ 81.0	$ 84.9	$ 82.4	$ 80.0	$ 81.9
Cumulative mark-on, %	48.0%	50.2%	49.7%	49.9%	49.9%	50.2%	49.2%	51.1%
Gross margin, % of sales incl. cash discounts	42.2	43.6	38.9	40.7	39.2	40.7	42.9	49.3
Markdowns, retail, % of sales	13.2	18.2	14.9	22.9	24.7	23.1	17.5	11.1
Returns, % of sales	8.0	10.0	8.7	13.3	14.8	11.4	12.4	7.4
Sales promotions, % of sales	3.0	3.1	3.2	3.5	3.3	3.0	3.2	2.1
Salespeople's salaries, % of sales	7.7	7.2	9.1	7.8	7.7	6.5	8.2	8.3
Number of stock turns	3.1	4.0	2.4	3.5	3.5	4.4	4.2	3.3

Source: National Retail Merchants Association, "Merchandising & Operating Results," (1980 Edition).

CONSUMER BUYING HABITS

NPD Research, Inc. compiles the NPD (National Panel Diary) Textile and Apparel Market Index, a specialized service based on an on-going monthly diary tracing the purchases of 6,500 nationally representative families. Findings for the 1977, 1978 and 1979 years, covering women's dresses are given below.

Percent of Women's Dress Purchases by Price Points, 1977-1979

	1979		1978		1977	
	Units	$	Units	$	Units	$
Less than $10.00	19.6%	5.5%	23.3%	6.5%	22.1%	6.6%
$10.00 - $19.99	35.7	23.3	32.1	21.0	34.2	22.8
$20.00 - $29.99	20.3	21.3	19.1	20.3	19.4	21.2
$30.00 - $39.99	11.9	16.0	11.8	17.6	12.5	19.1
$40.00 - $49.99	6.5	12.2	6.0	11.5	5.7	11.2
$50.00 - $79.99	6.8	14.9	6.4	16.6	4.9	13.2
$80.00 & over	1.3	6.7	1.2	6.5	1.1	5.8

Source: NPD Research, Inc.

According to NPD's panel reports, the greatest concentration of dress purchases is in the $10.00 to $19.99 price range category, followed by the $20.00 to $29.99 grouping. Higher priced dresses, $80.00 and over, accounted for 6.7% of dollar sales in 1979, slightly higher than the 1978 report.

In using results of panel reports, however, it should be kept in mind that women in upper income brackets, who do most of the spending for $80-and-over dresses, are underrepresented in such data.

Specialty stores continued to hold the highest share of reported dress purchases in 1979 according to National Panel Diary. From 1977 to 1979 purchases in specialty stores decreased approximately 1.5 percentage points, but kept an overall average of just over 30%.

Department stores, in second place, accounted for 28.7% of dress purchases reported by panel members in 1979 and in 1978.

Percent of Dress Purchases by Outlet Type, 1977-1980

	1979		1978		1977	
Store type	Units	$	Units	$	Units	$
Department	28.7%	34.5%	28.7%	33.9%	30.7%	35.8%
Specialty	31.3	38.1	32.5	40.6	32.8	39.6
Discount	17.6	9.8	14.2	7.8	13.6	7.7
Variety	16.5	12.5	18.0	11.9	16.5	11.7
Mail Order	2.0	1.9	2.0	1.7	1.3	1.4
Other	3.9	3.0	4.6	3.9	4.1	3.8

Source: NPD Research, Inc.

CONSUMER BUYING HABITS

NPD's panel reports showed a concentration of dress purchases in the spring and early summer, as noted below.

Percent Distribution of Reported Dress Purchases by Months, 1977 - 1979

Month	1979		1978		1977	
	Units	$	Units	$	Units	$
January	4.6%	4.5%	4.0%	3.8%	3.7%	4.1%
February	5.8	5.4	5.5	5.9	6.2	6.1
March	9.0	9.9	9.0	8.6	8.6	9.2
April	11.7	12.5	9.7	10.1	11.9	12.6
May	11.9	11.3	12.7	11.2	11.1	10.8
June	11.5	10.8	11.7	10.1	9.6	8.4
July	9.9	8.7	11.2	9.4	11.1	8.8
August	8.5	7.2	8.3	7.6	9.1	8.7
September	7.8	8.3	7.3	9.4	7.2	7.9
October	5.6	6.6	7.2	7.9	6.8	7.6
November	6.3	6.6	5.8	6.8	6.1	6.8
December	7.4	8.1	7.7	9.1	8.6	9.2
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Source: NPD Research, Inc.

A Media General Market Analysis, covering Hillsborough County, Florida, developed information on dress purchases through personal interviews conducted by Belden Associates, Dallas, Texas. The report was issued in November 1980, and reflects purchasing patterns among 447,000 adults (including 236,000 women).

Among all adults 18 years and older in Hillsborough County, in the 12 months prior to the study, 23% had purchased dressy dresses, 25% had purchased casual dresses. Considering age groups, the highest incidence of purchasers of dressy dresses is between the ages of 25-34 years (30%).

Hillsborough County, Fla. Adults Who Purchased Dresses In The Past 12 Months.

Age of Purchaser	Dressy Dress	Casual Dress
18 - 24 years	26%	24%
25 - 34 years	30	32
35 - 44 years	16	22
45 - 54 years	29	23
55 - 64 years	20	24
65 years & over	15	23
Annual household gross income		
Under $10,000	22	24
$10,000 - $19,999	20	25
$20,000 - $34,999	28	26
$35,000 & over	27	33

Note: Total adults (male and female) in each age and income group equal 100% in the above table.

CONSUMER BUYING HABITS

In September 1978, Seventeen Magazine conducted a mail survey among members of their Consumer Panel representing a cross-section of teenagers currently attending high school or college. A total of 2,679 returns were received, representing a total of 9,280,000 teenage-female students in the U.S.

A projected total of 6,694,000 had purchased dresses, spending a total of $469,310,000 for 16,645,000 dresses of all types in preparation for returning to school in the fall, 1978.

Dress Purchases By Teenage Females

	Number Purchasing (000)	Number Purchased (000)	Total Expenditures (000)
Dresses			
School	*	9,556	$234,170
Date	*	4,385	132,140
Formal gowns	1,547	1,848	84,210
Jumpers	690	856	18,790
Total	6,694	16,645	$469,310

*Figures were reported by dress length and are not additive.

Type of Store Where Dresses Are Usually Purchased

	Percent*
Total	100.0%
Department store	59.0
Boutique/specialty store	41.0
Discount store	5.0
Variety store	4.0
Mail order	2.0
Other	5.0
No answer	2.0

*Adds to more than 100.0% due to multiple responses.

(continued)

Size of Dress Last Purchased

	Percent
Junior size (78.0% of total)	100.0%
Size 3	4.2
5	18.5
7	27.6
9	25.6
11	16.4
13	6.9
15 or larger	0.8
Misses size (15.2% of total)	100.0%
Size 4 to 8	22.3
10	23.1
12	21.1
14	16.5
16	11.8
18 or larger	5.2
No answer (6.8% of total)	

Source: Seventeen's Back-to-School Study/1979.

Detailed findings in a series of surveys conducted in 1978-1979 for Women's Wear Daily by The Home Testing Institute on women's apparel buying habits, including dresses, will be found in two special Fact File Editions: The Customer Speaks - 1979, and The Customer Speaks - 1980.

FAIRCHILD FACT FILES AVAILABLE FOR 1980

CONSUMER MARKET DEVELOPMENTS: Summarizes key economic trends and indicators, particularly those having a direct relationship to the consumer market for durable and nondurable goods. A wide variety of sources are drawn on to present an overview of economic developments and market trends, as well as consumer market dynamics, including trends by age group, educational and income levels, buying patterns and outlook.

THE CUSTOMER SPEAKS—1980: Supplementing the comprehensive reports on fall/winter and spring/summer wardrobes (published in THE CUSTOMER SPEAKS, 1979 FACT FILE), this report covers details on buying practices in relation to specific types of women's wear, as well as information on reactions to price increases, attitudes toward stores and sales help, views regarding quality levels in specific types of apparel and more. Findings are based on a nationwide survey among a representative sample of women and are presented in terms of significant demographic characteristics. ($15.00)

THE CUSTOMER SPEAKS (A FACT FILE SPECIAL EDITION): Complete findings of two nationwide surveys conducted for Women's Wear Daily among a cross-section of women on their fall/winter and spring/summer wardrobes, their new apparel acquisitions, and buying plans for next season. Also includes information on buying habits, place of purchase, activities, attitudes, and outlook. Data is analyzed in terms of demographic characteristics, employment status, fashion stance, and degree of social activity. (204 pages, $20.00)

DEPARTMENT STORE SALES: Covers the latest available annual sales of department stores throughout the country listed by buying headquarter location. Includes data on number of outlets covered in reported sales totals, as well as information on sales for many branch and main stores. Some leading specialty operations are also included in the listing by location. Other listings: department store operations with sales of $50 million or more reported in order of volume, major conglomerates with general merchandise store or apparel store divisions, and department stores operated by major department store corporations.

FASHION ACCESSORIES: Information on a wide range of fashion accessories for men and women, including jewelry, watches, gloves, belts, handbags, small leather goods, neckwear, hats. Includes key information at manufacturer level, as well as available retailer and consumer data. Also covers important fashion developments.

HOME ELECTRONICS: A statistical summary of the consumer electronics market. Product classifications include home entertainment and related products (television sets, radios, stereos, audio and video systems, video games, etc.) as well as home security and fire protection devices and calculators. Data presented at the manufacturer, retailer, and consumer levels.

HOME TEXTILES: Information on the industry includes the latest data on number of manufacturers, production and shipments for a wide range of products, including bed linens, towels, blankets and comforters, slip covers, pillows, curtains and draperies. Trends in merchandising, departmental operations and consumer buying patterns are also covered.

HOUSEHOLD FURNITURE AND BEDDING: Provides industry-wide data on manufacturers' shipments of furniture and bedding (mattresses and bedsprings) and number, size and location of manufacturing firms as well as sales of leading manufacturers. Retail information includes sales in furniture and department stores, popular furniture styles and materials, and on consumer buying habits.

INFANTS', TODDLERS', GIRLS', AND BOYS' WEAR: Manufacturer data spotlights production, value of shipments, number of manufacturers, employment in the industry by company size, price trends. At the retailer level, data focuses on operating ratios in department and specialty stores, seasonal patterns in advertising, more. Information is also presented on consumer spending and buying preferences.

MAJOR APPLIANCES AND ELECTRIC HOUSEWARES: Covers a wide range of products in the major appliance and traffic appliance classifications, including heating, laundry and cooking appliances for household use, cleaning equipment, and personal care appliances. Details production and shipments, sales trends, retail merchandising results, more.

MEN'S CLOTHING, TAILORED SPORTSWEAR AND RAINWEAR: Manufacturer level profiled by production, value of shipments, employment, size of firms, more. Imports from key foreign sources by unit and dollar value covered, and data is also presented on retail sales and merchandising.

MEN'S FURNISHINGS AND CAREER/WORK WEAR: Includes information on number of manufacturers, production and shipment figures, geographical distribution, size of firms, imports and exports. Also provides data at the retail level, including sales and merchandising trends, and advertising patterns.

MEN'S SPORTSWEAR, CASUAL WEAR, JEANS AND ACTIVE WEAR: The wide variety of men's wear items included in this broad category are covered from available information on the industry at the manufacturer, retailer and consumer level. Included is information on production and shipments, imports, exports, market trends, retail sales and consumer buying practices. Trendy data, such as developments in Western wear, designer labels and fashion jeans, are included.

MEN'S, WOMEN'S, AND CHILDREN'S BODYWEAR AND LEGWEAR/HOSIERY: A comprehensive report on these industries at the mill, retailer and consumer levels. Included are details on production and shipment, retail sales by type of outlet and on patterns in consumer spending in terms of major demographic characteristics.

MEN'S, WOMEN'S AND CHILDREN'S FOOTWEAR: Findings in a 1980 survey on consumer purchases of footwear are an important new feature of this FACT FILE. Also included are data on major trends in the industry in relation to imports, domestic production and shipments, as well as developments at the retail level.

SOFT SURFACE FLOOR COVERINGS: Trends in the number of manufacturers, in production and value of shipments of major types of soft surface floor coverings are covered in this report. Also included are developments in fiber consumption. Retailing information includes departmental operations, estimated volume by type of outlet and trends in consumer buying.

THE TEXTILE-APPAREL INDUSTRIES: Industry overview, providing statistics on fibers and fabrics, as well as finished goods. Includes information on industry size, concentration of sales by mill/manufacturer size, production and shipments by U.S. mills. Also: exports and imports. Covers capital expenditures and data on mill machinery.

TOILETRIES, BEAUTY AIDS, COSMETICS AND FRAGRANCES: A detailed view of the industry, covering production for both the female and male market. Includes latest available industry statistics and projections, as well as data on leading manufacturers in various product categories. Consumer expenditure data, buying habits and usage of various product types are also highlighted, as well as data on sales by outlet type, and advertising expenditures by major producers.

WOMEN'S COATS, SUITS, RAINWEAR AND FURS: Details number of manufacturers by employment size, cuttings, and value of shipments. Also covered at the industry level are price trends and imports/exports. At the retailer level, data is presented on estimates of retail volume, merchandising and operating results, and seasonal patterns in advertising. Also focuses on consumer buying habits and plans.

WOMEN'S INNER FASHIONS: NIGHTWEAR AND DAYWEAR: Data on production and shipments, tracing market shifts in response to fashion changes. Also: imports, retail trends and merchandising ratios, and data on consumer buying habits.

WOMEN'S SPORTSWEAR, SEPARATES, JEANS AND ACTIVE WEAR: A statistical view of this segment of the women's wear industry is provided, including data on production and value of shipments, imports of major categories, sales by type of outlet, and consumer buying habits. Also included is information on departmental merchandising and operating results, as well as important developments in retailing, such as the designer label.

For orders and further information, please write to:

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